ERA Rollout in the Department of Energy

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Agenda

- ERA Adoption Plan

- Sequence of Steps to Deployment

- Connectivity

- Links to Account Management Forms and Training

ERA Adoption Plan – Important Milestones

- March 2011
  - Began rolling out ERA to 30 CIO Council Agencies
  - **DOE at HQ level rolled out July 2011**
- July 2011
  - ERA available for use by all Federal agencies
  - The preferred way for scheduling and transferring records to NARA
  - Progressive rollout to the rest of the Government
- End of FY 2012
  - ERA is required in order to schedule and transfer records to NARA
  - NARA will be contacting agencies to schedule preparation and training activities prior to agency adoption

ERA Adoption Plan – Important Milestones

- By September 2012:
  - Use ERA for scheduling records in any media regardless of classification and transferring permanent records to NARA
  - Provide feedback to NARA and help it improve the system

Sequence of Deployment Steps

- Introductory meeting
- Series of steps to take place prior to launch of ERA
  - Steps include identifying user roles, setting up accounts, training staff, getting connected and identifying workload
- Boot Camp training session(s)
- Kick off
  - NARA help guide them through the process if necessary
  - NARA prepared to give immediate feedback

Connectivity

- Connectivity Issues
  - Firefox v3.6.X or Internet Explorer v7 recommended
  - Windows XP recommended
  - NARA needs to know your IP address range
  - Packaging Tool
    - Download from http://www.archives.gov/records-mgmt/era/packaging-tool.html
    - Connected from ERA portal
    - Requires Java Runtime Environment (JRE) v6 or Later
  - No other specific hardware requirements

Getting Started Using ERA

- Getting Started Using ERA
  - http://www.archives.gov/records-mgmt/era/
  - http://www.archives.gov/records-mgmt/era/account-request.html
- Step One – Appoint an ERA Account Manager
  - ERAaccounts@nara.gov

Getting Started Using ERA

- ☐ Step Two - Determine ERA User Roles
  - ◼ Agency Roles in ERA
    - ☐ Scheduling Records
      - ◼ Records Scheduler
      - ◼ Certifying Official
    - ☐ Transferring Records
      - ◼ Transferring Official
      - ◼ Electronic Transfer Staff
      - ◼ AgencyApproving Official
  - ◼ ERA Account Official assigns ERA roles to staff

Getting Started Using ERA

☐ Step Three – Get ERA Users Trained

- ■ http://www.archives.gov/era/training/intended-audience.html
- ■ Identify the classes they need
- ■ http://www.archives.gov/era/training/
- ■ Get users trained

Getting Started Using ERA

☐ Step Four - Submit ERA User Account Requests

- ■ ERA User Account Request Form (NA 3070)
  - ☐ Each User fills out the form and submits it
  - ☐ ERA Account Manager verifies information and forwards to ERAaccounts@nara.gov

Getting Started Using ERA

- Step Five – Attend additional hands-on training [invitation forwarded later]
  - Pre-requisite for the additional training:
    - Completing the first four steps of the Getting Started Using ERA process.
    - Each person who attends the training should have taken the online training (Step Three) and obtained a User ID and Password (Step Four).
  - Enroll at https://nara.learn.com/learncenter.asp?id=178413&DCT=1&sessionid=3-8926C243-24DA-426C-B7FF-69EA376E92B3&page=48&mode=preview&

Getting Started Using ERA

- Log on to ERA!
  - http://www.archives.gov/records-mgmt/era/

Using ERA

- File transfer sizes
  - HTTPS Upload: 1 gb package size maximum
  - SFTP Upload: unlimited depending upon bandwidth
  - Physical media: suggested for larger shipments
- Prepare work
  - Schedules
    - The quantity of records schedules you may be creating
  - Transfers
    - What records will you be transferring to NARA
    - Let NARA know the disposition authorities of the records you want to transfer by sending email listing the disposition authorities to legacy.schedule@nara.gov
- ERA Help Desk at ERAHelp@nara.gov or 877-372-9594
- Start using ERA
  - Communicate with your appraisal and accessioning archivists

Contact

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Or your appraisal or accessioning archivist

Or the ERA Help Desk at 877-372-9594 or ERAHelp@nara.gov